



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**(1) First and Final Accounting and Report of Status Administration and Petition
 Thereof and (2) for Final Distribution**

DOD: 8/5/2001	VICTOR W. SIDERS , Administrator with Will Annexed, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 4/16/14. Minute order states no appearances. The Court orders Gilbert Zavala to be personally present on 5/21/14. Copy of minute order and examiner notes mailed to Gilbert Zavala on 4/17/14. As of 5/16/14 the following issues remain. Need Amended First and Final Account based on the following: 1. Accounting does not comply with Probate Code §1060 et seq. 2. Inventory and appraisal was not signed by the probate referee and does not include any property. Attached to the inventory and appraisal is a summary of account that does not comply with Probate Code §1060. 3. Need Notice of Hearing. 4. Need proof of service of the Notice of Hearing on Brian L. Fox pursuant to his Request for Special Notice filed on 3/10/03.
	Account period: 3/21/03 – 12/8/13	
Cont. from 041614		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/16/14
		Updates:
		Recommendation:
		File 1 – Siders

**(1) First and Final Report of Administration, and Petition for Final Settlement, and
(2) for Final Distribution, Accounting Waived**

DOD: 9-19-03			<p>HUBERT DONNY, Co-Executor with full IAEA without bond, are Petitioners.</p> <p>Petitioner states co-Executor Robert Donnie died January 8, 2008.</p> <p>I & A filed 10/21/2004 indicates a total estate value of \$225,000.00 consisting of real property located on Van Ness in Fresno.</p> <p>POH: \$0</p> <p>Co-Executor (Statutory): Waives</p> <p>Attorney (Statutory): \$7,500.00</p> <p>Costs: \$775.00 (filing, publication, appraisal, certified copies)</p> <p>Petitioner states the real property was sold during administration. At this time, there is no cash balance of the estate subject to distribution by the Court.</p> <p>Petitioner prays for an order as follows:</p> <ol style="list-style-type: none"> 1. Ratifying, confirming and approving the acts and transactions of the Co-Executors; 2. That the estate be closed; 3. That the account be settled, allowed and approved; 4. Distribution of estate not now known or discovered to the persons entitled thereto; 5. Petitioner waives statutory compensation; 6. Authorizing payment of the statutory attorney compensation and costs; and 7. For all other proper orders. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. The heirs of the estate were Co-Executors Hubert Donny and Robert Donny. Robert Donny died in 2008. The petition states the real property was sold, but does not indicated how the proceeds were distribute. The Court may require clarification as to how the proceeds were distributed. 2. Petitioner requests the Court ratify and approve the acts and transactions of the Co-Executors; however, it appears the estate was distributed without Court authorization in violation of Probate Code, and then abandoned, requiring status hearing to be set by the Court for closure 10 years later. The Court may strike language ratifying such acts from the order. 3. Attorney Renge requests the full amount of statutory fees and reimbursement for costs based on the I&A. However, the petition does not provide an explanation for failure to timely close the estate. Examiner notes that there had been no activity in the estate between filing the Inventory and Appraisal on 10-21-04 and the status hearing set by the Court in November 2013 – over 9 years – even though the property was apparently sold and proceeds distributed in violation of Probate Code requiring petition and order. Pursuant to Probate Code §12205, the Court may reduce compensation.
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
N/A	FTB Notice			

Petition for Appointment of Successor Personal Representative and for Issuance of Letters Testamentary

DOD: 4-17-03		KEVIN WINGERT , named alternate executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		ANNA WINGERT , surviving spouse, was appointed Executor with Full IAEA without bond on 12-13-15.	1. Petitioner did not use the mandatory Judicial Council form Petition for Probate DE-111. 2. Petitioner used the regular "Notice of Hearing" Form DE-120 instead of Form DE-121 "Notice of Petition to Administer Estate," which contains the language required by Probate Code §8100.
<input type="checkbox"/>	Aff.Sub.Wit.	I&A filed 11-9-06 indicates a total estate value of \$6,000.00 (settlement proceeds).	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Mrs. Wingert died on 12-14-06.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Petitioner requests appointment as executor without bond and that Letters Testamentary be issued to him with full IAEA.	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Declaration of Attorney Rube states that upon appointment, Petitioner plans to file a Probate Code §12251.	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc Reviewed on: 5-16-14 Updates: Recommendation: File 3 - Wingert	

DOD: 10-11-04		<p>MALKIA DILLARD, Administrator with Full IAEA without bond, is Petitioner. Petitioner states she is the sole heir and waives accounting.</p> <p>I&A: \$42,565.84 POH: \$0</p> <p>Administrator (Statutory): Waived Attorney (Statutory): Waived</p> <p>Petitioner states the creditor's claim in the amount of \$24.32 filed by the Revenue Reimbursement Division of the City of Fresno on 12-5-06 was paid from Petitioner's personal funds.</p> <p>Petitioner states all of the assets of the decedent were under \$43,000.00. The assets consisted of bank accounts and an investment account which were transferred prior to the decedent's death to either joint tenancy or solely in the name of a local attorney. One of those assets involved the sale by the attorney of stock which resulted in IRS assessing more than \$25,000.00 in taxes. As a result the IRS levied against the bank accounts of the decedent in 2006 after his death. The Administrator filed a lawsuit against said attorney which resulted in settlement and payment of the assets directly to Petitioner as the decedent's daughter (contents of a safe deposit box) in addition to a \$3,000.00 settlement. Receipt filed 11-3-08.</p> <p>Petitioner states during administration, counsel for petition was also able to obtain a full refund from the IRS in the approximate amount of \$29,000.00 on a levy mentioned above. The refund was paid directly to Petitioner as the sole heir by the IRS.</p> <p>Petitioner states the entire value of assets listed on the I&A (\$42,565.84) was paid directly to Petitioner and an ex parte petition to terminate the probate was sought since no assets came into the estate, but it was denied.</p> <p>Petitioner requests that: 1) Administration be brought to a close without accounting; 2) All acts and proceedings of Petitioner as personal representative be confirmed and approved; 3) That the waiver of statutory attorney fees and commissions be approved; 4) That payment of the decedent's assets directly to Petitioner as a result of the lawsuit and IRS refund be approved; 5) That distribution of any other property not now known or discovered be made to Petitioner as sole survivor of the decedent; and 6) that any further orders be made as the Court considers proper.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3-5-14</p> <p>See Page 2.</p>	
Cont from 030514				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Mail			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Order			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

NEEDS/PROBLEMS/COMMENTS:

1. The Court may also require clarification as to the Administrator's failure to close the estate within a reasonable time frame.
2. Although I&A includes total assets of \$42,565.84, Petitioner now states that no assets were received into the estate: The \$3,000.00 settlement, the \$29,000.00 IRS refund, and the contents of the safe deposit box were paid directly to the Petitioner. However, this does not account for the other assets inventoried (cash accounts totaling over \$10,000.00) and further appears to be an inappropriate and unauthorized distribution, since the estate was opened in order to pursue the assets, and once received, should have been received by the estate.

Need authority for receipt outside of the estate.

3. Regardless of what is on hand at the present time, the estate did recover assets that were distributed, appropriately or not, to the Petitioner as the sole heir. Therefore, the filing fee for this final petition of \$435 is due.
4. Receipt filed 11-3-08 indicates receipt of various personal property items that were not inventoried or valued, including jewelry, antique coins, other). Personal property must be appraised by the probate referee. Probate Code §8900 et seq.
5. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing pursuant to Probate Code §1252 and Request for Special Notice filed 12-8-06 on County of Fresno Revenue Reimbursement Division.
6. Petitioner States the creditor's claim of \$24.32 was paid from her own personal funds; however, no allowance was filed by the petitioner, and no withdrawal was filed by the claimant (County of Fresno).
7. ~~Petitioner does not address notice to the Director of Health Care Services pursuant to Probate Code §9202(a). If notice was required but not completed, continuance for proper notice and time for response is necessary. DHS has four months to respond.~~

Update: Notice of administration was sent to DHS on 3-7-14. Thereafter, DHS filed a Creditor's Claim for \$28,595.99 and a Request for Special Notice.

Therefore, need proof of service of Notice of Hearing on DHS with a copy of this petition at least 15 days prior to the hearing per Probate Code §1252.

8. Need order.

		NEEDS/PROBLEMS/COMMENTS: confidential
Cont. from 012214, 030514		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 5-16-14
		Updates:
		Recommendation:
		File 3B – Gainous

(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

DOD: 10-11-10		PUBLIC ADMINISTRATOR , Successor Administrator with Full IAEA, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. This estate was originally opened with a fee waiver by Former Administrator Karla Dean. The following filing fees totaling \$830.00 are due prior to any distribution: - \$395 (initial petition filed 5-17-12) - \$435 (petition for distribution filed 3-25-13 by Karla Dean) 2. Intestate heir Mary Johnson was a minor in 2012 when the estate was opened. She signed her Assignment of Interest on 4-16-13. It is unclear if she had reached 18 by that time. If not, the Court may require a new assignment to be signed, or revised distribution. Need clarification. 3. Petitioner requests \$248.00 in extraordinary fees for preparation and filing the final estate tax return, and also requests \$500.00 for "Final Tax Preparation." Need clarification. 4. Petitioner does not include the filing fee of \$435 for this petition in the request or payment calculation for the heirs of \$5,985.50. If requested, that brings the closing costs to a total of \$7,250.50 (including the \$435 paid for this petition and the \$830 due per #1 above).
		Account period: 6-18-13 through 2-5-14	
		Accounting: \$65,150.00	
		Beginning POH: \$65,150.00	
		Ending POH: \$65,000.00 (residence)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Public Administrator (Statutory): \$2,606.00	
<input checked="" type="checkbox"/>	Aff.Mail	Final tax preparation: \$500.00	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Public Administrator (Extraordinary): \$248.00 (1 deputy hour @ \$96/hr plus 2 assistant hours @ \$76/hr for preparation and filing of final tax return)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	Attorney (Statutory): \$2,606.00	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Costs: \$25.50 (filing, certified Letters)	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	In order to allow the beneficiaries to keep the house, they have agreed to pay the above fees totaling \$5,985.50.	
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt	Distribution pursuant to intestate succession and Assignments of Interest filed by heirs Hanna Johnson and Mary Johnson (See #2):	
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice	Karla Dean: A 25% undivided interest in the real property Roger Dean: A 25% undivided interest in the real property Julia Dean: A 25% undivided interest in the real property Holly Jo Johnson: A 25% undivided interest in the real property	

Reviewed by: skc
Reviewed on: 5-16-14
Updates:
Recommendation:
File 6 - Johnson

DOD:			NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by:	
		Reviewed on: 5-16-14	
		Updates:	
		Recommendation:	
		File 8 – McPike	

DOD: 5-1-13			SPECIAL ADMINISTRATION EXPIRES 10-30-14	NEEDS/PROBLEMS/COMMENTS:
			<p>ERIC SCHLOEN, Special Administrator, is Petitioner.</p> <p>Petitioner states in the petition for probate originally filed on 10-25-13, it was alleged that the value of the assets of decedent subject to probate administration was nothing (\$0.00). Petitioner has diligently searched for assets but has not discovered any property of any kind belonging to the decedent and in fact at all times prior to filing to the present, the estate has been insolvent.</p> <p>There are no costs, expenses or premiums on surety bonds incurred during administration including but not limited to funeral expenses and attorneys' fees.</p> <p>No requests for special notice have been filed. Consistent with Probate Code §9202, written notice was given to DHS and FTB.</p> <p>The Special Administrator has concluded the reason and purpose of this estate and so there is no longer any need for continued administration. Medi-Cal eligibility has been established.</p> <p>Petitioner prays:</p> <ol style="list-style-type: none"> 1. For an order terminating further proceedings for the administration of the estate; 2. For an order discharging petitioner as personal representative of the estate; 3. For such further orders as the Court may deem proper. 	
	Aff.Sub.Wit.			
✓	Verified			
N/A	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
				Reviewed by: skc Reviewed on: 5-19-14 Updates: Recommendation: File 9 - Chambers

Amended Petition for Appointment of Probate Conservator of the Person and Estate

	TEMP (PERSON ONLY) EXPIRES 5-15-14	NEEDS/PROBLEMS/COMMENTS:
	BRYAN SNAVELY and BRAD SNAVELY , sons, are Petitioners, and request appointment as Co-Conservators of the Person and Estate with bond set at \$712,848.00.	Court Investigator advised rights on 3-4-14.
Cont from 040914		Note: If the petition is granted status hearings will be set as follows:
<input type="checkbox"/> Aff.Sub.Wit.		• Thurs 7-10-14 at 9:00a.m. in Dept. 303 for the filing of the bond <u>and</u>
<input checked="" type="checkbox"/> Verified	Capacity Declaration of Don H. Gaede, M.D. filed 03/03/2014.	• Thurs 10-9-14 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u>
<input type="checkbox"/> Inventory	<u>Voting rights NOT affected.</u>	• Thurs 10-8-15 at 9:00a.m. in Dept. 303 for the filing of the first account.
<input type="checkbox"/> PTC	<u>Estimated value of the Estate:</u>	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input type="checkbox"/> Not.Cred.	Personal property - \$550,000.00	
<input checked="" type="checkbox"/> Notice of Hrg	Annual income - \$95,400.00	
<input checked="" type="checkbox"/> Aff.Mail	Real property - \$1,500,000.00	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Petitioners state they have been informed by the proposed conservatee's primary care physician that the proposed conservatee suffers from dementia. His house smells of rodent feces and urine. Food in the refrigerator and freezer is beyond expiration dates. He stores tools with sharp edges and blades in the house. The proposed conservatee cannot care for himself, prepare meals and maintain his residence in a clean and safe condition.	
<input checked="" type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input checked="" type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202	The proposed conservatee attempts to pay his bills, but places written checks with statement and does not mail payment. P.G.&E is threatening to shut off power because of unpaid bills. He makes impulsive purchases when watching television and responds unquestioningly to "investment offers" received in the mail. Recently he agreed to sell some real property for at least \$40,000 less than what it is worth in a transaction where the real estate agent represents both buyer and seller.	
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input checked="" type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
<u>SEE ADDITIONAL PAGES</u>		

Page 2

Report of Attorney Bagdasarian for Conservatee filed on 03/07/2014 states he has reviewed the Petition for Appointment of Probate Conservator of the Person filed 01/28/2014, the Court Investigator Investigation to Establish Temporary Conservatorship, the Confidential Supplemental Information filed 01/28/2014, the Amended Petition for Appointment of Temporary Conservator of the Person and Estate filed 02/28/2014 and Amended Capacity Declaration. Attorney Bagdasarian has discussed the Petition with J. Stanley Teixeira, the Attorney for the proposed Conservators Brian Snavelly and Brad Snavelly.

Attorney Bagdasarian visited the proposed Conservatee on 03/03/2014 and discussed with him the matters raised in the Petitions for Appointment of the Probate Conservator of the Person and Estate. In speaking with the proposed Conservatee, he was extremely adamant that he did not feel that he required the conservatorship of the person and estate to be imposed upon him and asked that it be dismissed. Mr. Snavelly's son has now moved in with him and is providing the necessary care the he needs. Mr. Snavelly handles most to his own banking matters and property issues and wants to continue to do the same. While the capacity declaration indicated a mild dementia, Mr. Snavelly does not believe that should effect his ability to handle his own health issues and manage his assets.

Court Investigator Julie Negrete filed a report and a supplemental report on 03/04/2014.

	KEVIN S. CAMPBELL, beneficiary, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: Continued from 4-9-14. As of 5-15-14, nothing further has been filed. The following issues remain: 1. Probate Code §17201 requires the petition to list <u>all persons entitled to notice</u> . Petitioner lists the other <u>living beneficiaries</u> ; however, need clarification: Does this list include <u>all persons entitled to notice</u> pursuant to §17203? For example, it appears that according to the terms of the trust, spouses and issue of beneficiaries may also be entitled to notice. Some of the beneficiaries are deceased. Is anyone else entitled to notice? 2. Need dates of death per Local Rule 7.1.1.D. for: - Jerry W. Campbell (trustor) - Billie J. Campbell (trustor) - Randall Campbell (deceased beneficiary) - Ricky Campbell (deceased beneficiary) - Jennifer Campbell (deceased beneficiary) 3. The attached copy of the trust is blank at various pertinent sections, such as the amount initially transferred, the appointment of a trustee, the amount initially received by the trustee, and Schedule A. Need clarification: Is a complete copy of the trust available? 4. According to the terms of the trust, the trust was to be split into six <u>separate</u> trusts for each beneficiary upon the deaths of the trustors. However, Petitioner appears to be requesting accounting for the original trust since its inception through the present. The Court may require clarification regarding the requested account period and for which trusts. <u>SEE ADDITIONAL PAGES</u>
	Petitioner states he is an income and principal beneficiary of The Jerry W. Campbell and Billie J. Campbell Irrevocable Trust dated March 28, 1991 . The trust is irrevocable.		
	Petitioner states DAVID E. ASH is the duly appointed and acting trustee. Petitioner states the trustee has not made any report of information whatsoever concerning the trust for the period starting with commencement of the trust on 3-28-91 until 8-3-00. For the period 8-3-00 until 2-1-09, the trustee provided incomplete and handwritten information (see attached copies). All of this incomplete and handwritten information is written so sloppily that it is difficult or impossible to comprehend. Moreover, because no information has been provided concerning the trust from 3-28-91 through 8-3-00, there is no context for understanding what little incomplete information has been provided.		
	Petitioner states that on or about 7-1-13 Petitioner delivered by facsimile a written request for information pursuant to Probate Code §§ 16062 and 16063. To date, the trustee has failed and refused to prepare and provide Petitioner with the requested account.		
	Petitioner prays for an order: 1) Compelling David E. Ash as trustee to prepare and file with this Court an account of the trust since its commencement on 3-28-91, including copies of any and all documents that support, substantiate, or evidence any item set forth in the accounting; 2) Instructing David E. Ash to petition this Court for the settlement of the account and give notice of the hearing on the petition;		
	3) For such attorney fees and costs as may be allowable by law; and 4) For all other orders the Court deems proper.		
Cont from 040914	Aff.Sub.Wit.		Reviewed by: skc Reviewed on: 5-15-14 Updates: Recommendation: File 11 – Campbell
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
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	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS (Continued):

5. Probate Code §17000(b)(7)(B) allows petition under this section if the trustee has failed to provide the requested information within 60 days after the beneficiary's reasonable written request.

Petitioner states he faxed a request to the trustee on or about July 1, 2013, and to date the trustee has failed and refused to prepare and provide the requested account.

However, the copy of the letter at Exhibit C does not indicate any fax number or designation (i.e., "sent via facsimile") or fax confirmation data on the page, and Petitioner also does not indicate whether the communication was followed up via regular or certified mail, or telephone call, or whether he was able to confirm receipt of the fax.

Further, the copies of the ledger information provided by the trustee appear to be dated as late as November 2013, which is after the date of the request. This indicates that the copies may have been provided in response to the request.

If so, need clarification as to whether reasonable written request was made after receipt of the ledgers in response to the letters, providing time for response pursuant to Probate Code §17000(b)(7)(B).

6. The copy of the letter at Exhibit C is addressed to David Ash at an address on Locust Avenue; however, Notice of Hearing for this matter was sent to an address on Herndon Avenue. The Court may require clarification or continuance for proper notice.
7. The proposed order includes his filing costs and attorney fees in the amount of \$1,500.00. The Court may require an itemized declaration regarding the fees from the attorney.

		<p>GERALD H. BLUM, Father, was appointed Conservator of the Estate on 4-7-88.</p> <p>The Conservator's 7th Account was settled on 3-20-12.</p> <p>On that date, the Court set this status hearing for the filing of the 8th Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need 8th Account or written status report per local rules.</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 5-19-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Blum</p>	

	PUBLIC ADMINISTRATOR was appointed on the court's own motion as Successor Administrator on 7/31/13.	NEEDS/PROBLEMS/COMMENTS:
		1. Need petition to close the estate or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from 102913	JULIE FULCHER , ex-wife, was appointed as Administrator with Full IAEA without bond on 8/23/11. Ms. Fulcher was removed and the Public Administrator appointed on 7/31/13.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
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Notice of Hrg		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 5/16/14
		Updates:
		Recommendation:
		File 14 – Fulcher

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

		<p>TEMP EXPIRES 5-21-14</p> <p>ALICIA DIAZ-REYES, Sister, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.</p> <p>Voting rights affected</p> <p>A Capacity Declaration was attached to the petition.</p> <p>Petitioner states the proposed Conservatee is diagnosed with Waardenberg Syndrome and SCA-2 and also suffers from seizures. When last tested, she functioned at the cognitive ability of a 5-6 year old child. The proposed Conservatee requires constant care and is never left alone. She is nonverbal but knows certain basic signs in American Sign Language. The proposed Conservatee attends high school special education in Fresno. She is considered severely developmentally delayed. Petitioner believes her cognitive abilities have decreased since her last assessment, which was several years ago.</p> <p>Court Investigator Samantha Henson filed a report on 4-9-14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 4-4-14.</p> <p>Voting rights affected - Need minute order</p> <p>Note: It appears that all issues previously noted have been cured.</p>	
Cont from 041614				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
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	Not.Cred.			
✓	Notice of Hrg			
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✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 4-15-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 16 – Duarte</p>		